

## JULY ACTIVITIES FOR THE AUGUST BOARD MEETING

### IHLS Monthly Staff Report

#### Tying our Activities to the ISL Priorities

#### Priority: Resource Sharing

#### Goal I: Provide an innovative resource discovery, sharing and delivery system:

#### Objective A: Encourage resource sharing

##### Activities

1. Utilize training on the SHARE Polaris platform for all available modules across a variety of delivery methods. When appropriate, interlibrary loan, reciprocal borrowing and reciprocal access as well as copyright will be addressed.
  - SHARE staff provided 10 training opportunities on use of Polaris for circulation and cataloging
  
2. Continue support of statewide initiatives designed to expand and enhance service to library patrons. This support would include the involvement of system staff, information dissemination, as well as updated or new training opportunities for staff of member libraries. An example would include partnering with stakeholders in planning for a statewide resource sharing summit.
  - Participated in IDOR and ISL project to provide mapping software for libraries of Illinois.

SHARE Statistics	FY15						
	Circulation	ILL	Reciprocal Borrowing	Pac Searches	Holdings	Bibs	Patrons
May-14	736,091	129,779	58,784	651,784	9,027,758	1,886,611	802,743
Jun-14	822,888	125,101	65,477	788,302	9,003,233	1,883,498	797,887
Sept-14	905,510	154,053	55,538	742,432	8,995,198	1,872,863	810,038
Oct-14	919,651	163,798	55,769	879,563	9,009,041	1,828,813	811,636
Nov-14	774,715	131,037	48,673	757,958	9,019,234	1,830,868	814,280
Dec-14	730,911	130,580	48,792	613,143	9,009,264	1,841,676	805,018

Jan-15	858,769	155,127	57,008	735,170	8,991,006	1,839,988	804,899
Feb-15	790,917	145,355	52,047	687,870	9,001,314	1,843,721	804,008
Mar-15	863,377	159,912	56,228	1,560,054	9,010,811	1,835,452	803,628
Apr-15	811,727	148,130	52,698	1,815,939	9,023,056	1,840,633	807,234
May-15	676,532	126,478	51,043	1,324,682	9,029,121	1,834,127	803,903
Jun-15	830,204	135,395	67,776	1,253,461	9,044,459	1,817,765	804,119
July-15	784,275	139,522	65,457	1,459,531	9,048,654	1,834,594	806,374

**Objective B:** Provide a framework for members to participate in a state-of-the-art integrated library system.

**Activities**

1. Continue participation in the Statewide E-Books Grant opportunity.
  - At the end of July, 161 SHARE member libraries are participating in the 3M Cloud Library shared collection.
  - The total number of 3M items circulated in the month of July equaled 14,369. The highest number of circs we've seen in one month to date.
  - Three technology training sessions for library staff at two member libraries were held with 13 library staff members attending.
2. Apply for appropriate grants to provide enhancements to the SHARE catalog.
  - requested grant funding from the Ameren Community Giving program (request declined 7/29/15)
3. Employ a variety of instructional methods to allow SHARE members to work effectively and efficiently with the ILS, and other shared databases.
  - conducted four electronic forums utilizing Adobe Connect to discuss issues related to Circulation, Cataloging, Administration, and IT
  - conducted ten classes covering circulation and cataloging on Polaris
  - conducted two electronic forums utilizing Adobe Connect to discuss issues related to eResources
4. Promote new membership in the SHARE LLSAP through the *Growing Resource Sharing in IHLS Through Growing SHARE* grant. IHLS will continually consider opportunities to more fully involve these members in resource sharing.
  - met with representatives of the Odin School District, who have since decided to join SHARE.
5. Assist with the migration of libraries who do not wish to continue to participate in the SHARE LLSAP.

- removed collections and data for The High School of St. Thomas More, and Metro-East Lutheran High School, who closed their school libraries at the end of the 2014/2015 school year.
6. Continue to support the SHARE Helpdesk to track concerns and technical issues with the Polaris software.
    - SHARE and IT staff continue to support libraries through the helpdesk software.
  7. Continue the development and enhancement of the SHARE website to meet the informational and training needs of the IHLS libraries. Provide software and technical support for members of the LLSAP.
    - New framework is being installed and it is our hope that the SHARE website will become a branch of the IHLS website instead of a stand-alone website.

**Objective C:** Ensure the integrity of bibliographic records.

**Activities**

1. Maintain the requirement that all bibliographic records (with the exception of equipment, on order and E-book) must be OCLC derived records and have an OCLC control number to ensure database standards and mitigate duplicate records.
  - Clean up continues in the SHARE database with 527 bibliographic records were merged, 3032 item records corrected, and 537 bibliographic records edited for corrections.
  - 339 bibliographic records were converted to full level OCLC bibs for the SHARE database.
2. Support a Cataloging Center operation for SHARE Full members for copy and original cataloging of MARC bibliographic records and the creation of local authority records to enhance recovery. Service options are Cataloging Library (Full member meets continuing education requirements for cataloging staff and performs own cataloging); Barcoding A Library (Full member sends all new materials to Center for copy and original cataloging and assessed fee based on percentage of library's materials budget); Barcoding B Library (full member sends new materials as needed for original cataloging and assessed fee of \$10 per item cataloged). Any item that meets the Cataloging Maintenance Center's (CMC) eligible collections criteria for free cataloging is passed on to the CMC.
  - SHARE staff cataloged 666 items, imported 83 \$3 bibs and imported 102 PromptCat bibs for member libraries.
  - 353 items were cataloged for new member libraries who are in the process of joining SHARE.
  - 215 items were cataloged by the CMC staff for Illinois libraries.

3. Provide appropriate training for cataloging.
  - SHARE Cataloging training session was held via Adobe Connect.
  - Searching/Matching class was held in Rochester.
  - New member training for Christopher Public Library
  - Acquisitions training and support for 2 member libraries
  - Staff answered over 213 emails and telephone calls, requiring cataloging support.
  
4. Evaluate the efficacy and fee models associated with the Cataloging Center operation for possible revision.
  - \$3 Bib option started in July, which allows member libraries to search WorldCat for full-level OCLC bibliographic record, fill out a form on SHARE website, and SHARE staff to import the bib. This option allows for member libraries to take on the time and responsibility of searching for a quality bibliographic record. 83 \$3 Bibs were imported into the SHARE database during the month.

**Objective D:** Operate Cataloging Maintenance Centers on behalf of libraries in Illinois.

**Activities**

1. Fulfill NACO (Name Authority Cooperative Program of the PCC) obligation by creating a minimum of 100 name or uniform title authority records per year.
  - 28 name authorities were created in July.
  - 7 local series headings were created in July.
  
2. Continue support of LLSAP database cleanup efforts in LLSAP.
  - 339 bibliographic records were converted to full level OCLC bibs for the SHARE database.
  
3. Cooperate with Illinois State Library staff to identify statewide cataloging needs and develop strategies to meet them, prioritizing statewide initiatives that require cataloging expertise to ensure statewide access and resource sharing assistance with projects as agreed upon.
  - 215 items were cataloged by the CMC staff for Illinois libraries.
  - Metadata help and support were provided for Chicago Botanical Garden.  
Transcription of material continues for the State Archive

**Goal II: Provide a sustainable delivery system that provides the best service possible for Illinois libraries and their users.**

**Objective A:** Ensure that IHLS delivery of library materials is accurate, timely, and meets member library needs.

July 2015	Delivery picked up /delivered	ILDS Delivery Items to Hub	ILDS Delivery Items from Hub
CHAMPAIGN	202,345	29,282	27,823
DU QUOIN	93,468	21,239	20,095
EDWARDSVILLE	190,110	33,063	30,003

**Priority: Illinois Machine Sublending Agency**

**Goal: Provide good customer service and well maintained machines to patrons of the Talking Books Program.**

**Objective:** Support the statewide machine lending program located in DuQuoin.

**Activities**

1. Contract with the Illinois State Library to manage statewide services.
  - Required monthly reports were submitted to NLS.
  
2. Serve all persons eligible for service within the state of Illinois as stipulated in the agreement with NLS.

	C1s Sent	DS1s Sent	DA1s Sent	BARD Inquiries Responded To
<b>August 2014</b>	9	173	94	13
<b>September 2014</b>	22	154	134	15
<b>October 2014</b>	23	121	177	10
<b>November 2014</b>	10	110	114	12
<b>December 2014</b>	15	86	154	11
<b>January 2015</b>	22	78	159	14
<b>February 2015</b>	9	57	118	9
<b>March 2015</b>	19	86	176	13
<b>April 2015</b>	13	75	166	10
<b>May 2015</b>	21	74	139	14
<b>June 2015</b>	18	52	200	13
<b>July 2015</b>	29	72	225	15



3. Participate in the planning, coordination and evaluation of Illinois Talking Book Service, and ensure appropriate provision of services by staying informed of current procedures and trends related to Talking Books, the National Library Services/Library of Congress and librarianship in general.
  - 7/7/15 IMSA Manager and IMSA Director met to discuss state of IMSA progress.
  - 7/8/15 Patron Service Coordinator presented at Carbondale Towers.
  - 7/16/15 Patron Service Coordinator participated in Senior Outreach Event hosted by Senator Dave Luechtefeld and Rep. Terri Bryant at the Carbondale Civic Center.
  - 7/28/15 Patron Service Coordinator participated in Senior Outreach Event hosted by Senator Dave Luechtefeld and Rep. Terri Bryant Carbondale Civic Center in Mt. Vernon.
4. Ensure the efficient and successful provision of service in accordance with the Revised Standards and Guidelines.
  - Filled all requests for machines and equipment within 2 business days of receipt.
  - Responded to all BARD inquiries in a timely and efficient manner.

**In FY15**

- The department will move forward with new leadership and significant staff turnover.

**Priority: Provide timely and pertinent information to member libraries**

**Goal: Effective and efficient communications with member libraries and partners.**

**Objective A:** Provide various mechanisms to ensure good communications with member libraries and partners.

**Activities**

1. Conduct visits to 20% of our more than 550 agencies. This goal would give IHLS staff the opportunity to arrange approximately 110 on-site visits. A particular area of focus would be those library agencies who have recently seen a change in leadership. Another target audience would be those libraries facing any challenges that might impact their membership status and their ability to receive system services. Also in consideration would be conversations with library boards or other administrative bodies who might request specific information from IHLS. School staffing has shifted dramatically in the last several years and working to ensure that population is informed about system services and membership criteria would have a broad-based impact. When appropriate, system staff will also be available to meet with special interest groups for the purpose of discussing membership criteria and system services.

- A site visit was made on July 7th to the Marissa Public Library for the purpose of visiting with a new director.
2. Maintain an interactive website to assist member libraries in effective utilization of IHLS services and promote member forums.
    - Sent letter to 46 companies seeking discounts for the IHLS membership. Vendor Discount will be listed on the website.

### **In FY15**

- In concert with membership, system staff will strive to make communication with stakeholders as efficient and timely as possible.
  - Reviewed news feeds for information of interest to IHLS members such as grants, upcoming continuing education opportunities, and member news to be included in the IHLS newsletter.
  - The IHLS newsletter, Moving Forward Together, was sent each week to over 2,100 subscribers.

### **Priority: Administrative Activities**

#### **Goal 1: Ensure effective utilization of IHLS resources**

##### **Objective A: Ensure fiscal accountability**

##### **Activities:**

1. Dispose of surplus equipment in a manner consistent with Illinois State guidelines.
  - A large vanload of very old and properly surplused equipment was recycled through the Southern Illinois Recycling Company that specializes in electronic recycling.
2. Maintain IT support for IHLS staff including support of videoconferencing and Adobe Connect, as well as computer and server support.
  - IT Staff have installed new drive arrays at the EDW office and Champaign CoLo. This is to support the adding of new libraries on the Dream Grant.
  - IMSA Zebra label printers installed at each desk.
3. Continue to move services to our co-location facility in Champaign at the ICN POP site. All of the Polaris servers are located in the co-location site and other state-wide services such as Plinkit, DNS and other administrative websites will be moved there.
  - Once Plinkit has migrated in September this task will be complete.

**Objective B:** Employ qualified, professional, accountable staff.

**Activities**

1. Recruit and employ qualified personnel of diverse backgrounds to carry out the mission and goals of IHLS. Increase the applicant pool by participating in local community events, college job fairs and advertising current openings with culturally diverse media and professional organizations.
  - Recruited and filled 3 part-time positions
  - Preparing job description for new accounting position
2. Continue development of the evaluation process and assign goals for 2015. Supervisors will have quarterly one-on-one meetings with employees to ensure each employee is on track with goals.
  - Most all employees received a FY 2015 evaluation.
3. Implement an enhanced hiring process. Train managers/supervisors on interviewing techniques and tools. Create and implement employee orientation at all locations.
  - Conducted 3 new hire orientations
4. Provide training to staff in areas of management and content specific to their areas of responsibility. Develop a manager/supervisor 101 training to include employment law, employee relations, performance management and IHLS personnel code.
  - Scheduled 16 staff for Communications for Women workshop.
5. Seek and encourage participation in continuing education opportunities for staff as appropriate. Consider tuition reimbursement or enroll IHLS in Star program which enables employees to attend workshop or courses for one fee.
  - All employees are required to take 3 web based training sessions via Lynda.com
6. Provide all-staff training retreat focused on staff collaboration and customer service.
  - Scheduled all staff for personality workshop.
7. Continue monthly staff meetings as well as expand the Hi-Five local meetings that can update staff in each location about weekly activities.
  - Conducted High 5 in DuQuoin 7/1
  - Conducted High 5 in Champaign 7/15
8. Develop and implement a wellness program.
  - Began Sick Bank for FY 2016
  - Began exercise reimbursement for FY 2016



**Goal 1:** Ensure effective utilization of IHLS resources

**Objective A**

Ensure fiscal accountability

**Activities:**

Support the business operations of IHLS through monthly financial reports, payroll, accounts payable, and accounts receivable.

- Interviewed FY2014-15 Audit Firm Candidates and analyzed their request for proposals (RFP). IHLS Staff recommended Scheffel Boyle to preform IHLS' FY 2014-15 Audit to the IHLS Finance Committee and Board of Directors. IHLS' Board of Directors approved Scheffel Boyle to perform the audit.
- Prepared June 2015 Bill Payment and Credit Card Transaction Reports and Pre-Close June 2015 Statement of Revenues and Expenditures for IHLS Finance Committee and Board of Directors.
- Updated Illinois State Library (ISL) Quarterly Financial and Narrative Grants Reports with IHLS' 4<sup>th</sup> Quarter Financial Activity for submission on July 15, 2015.
- Prepared calendar year 2<sup>nd</sup> quarter and IHLS 4<sup>th</sup> quarter payroll tax reports and submitted to the Internal Revenue Service and IL Department of Revenue.
- Generated and mailed 1,255 accounts receivable invoices (*OCLC – 1,154 monthly, quarterly & annual; SHARE – 91 eResources; General – 10 Law Book*).
- Received and posted 450 accounts receivable cash receipts checks (*OCLC – 300; SHARE – 43 & General – 107*).
- Disbursed 111 Accounts Payable Checks.
- Received and entered 131 accounts payable invoices.
- Prepared and processed three payrolls.

**Goal II: Partner with the Illinois State Library and other organizations to support statewide services.**

**Objective B:** Work cooperatively with ISL, RAILS and other stakeholders to provide excellent library services.

**Activities**

1. Partner with statewide stakeholders in planning the combined "Library State of Mind" Conference for the fall of 2015.
  - Ellen Popit attended a program planning meeting on July 23<sup>rd</sup>.